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Meridian 1

M2216ACD Telephone

User Guide

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Introduction

What is ACD?

ACD stands for Automatic Call Distribution. The Meridian 1 system automatically controls incoming call routing to answering positions, and can provide music or recorded announcements to waiting callers.

The Meridian 1 ACD provides fast and dependable processing of your company's incoming calls.

Meridian Modular M2216ACD telephones provide easy access to a wide range of Automatic Call Distribution (ACD) features. Both models are designed to help you handle your daily telephone activities quickly and efficiently.

This booklet describes the operation of both agent and supervisor features for the M2216ACD telephones.

To identify your particular telephone type, see the next two pages. See "Learning to use your phone" for an explanation of your telephone's equipment.

You can expand your telephone's capabilities with additional hardware options. The following pages list the various hardware modules available for your telephone, such as additional key strips, Meridian Communications Adapter and External Alerter Interface. For more information, see the chapter titled "Hardware options."

During a power failure, electret headsets, function keys and the built-in display will still work. The carbon headset (M2216ACD-2) will losepower.

When power is restored, all options on both models become functional again.

M2216ACD-1

Standard equipment:

- Display module
- Dialpad
- 16 Function keys
- 16 LCD indicators
- Hold key
- Release key
- Speaker
- Volume control
- Message Waiting lamp
- 2 electret headset jacks

Optional hardware:

- Meridian Communications Adapter
- Key Expansion Module
- External Alerter Interface
- Analog Terminal Adapter

Speaker

Release (Rls) key

Message Waiting lamp

Hold key

Supervisor jack

Agent jack

Volume control key

LCD indicators

In-Calls key

Function keys

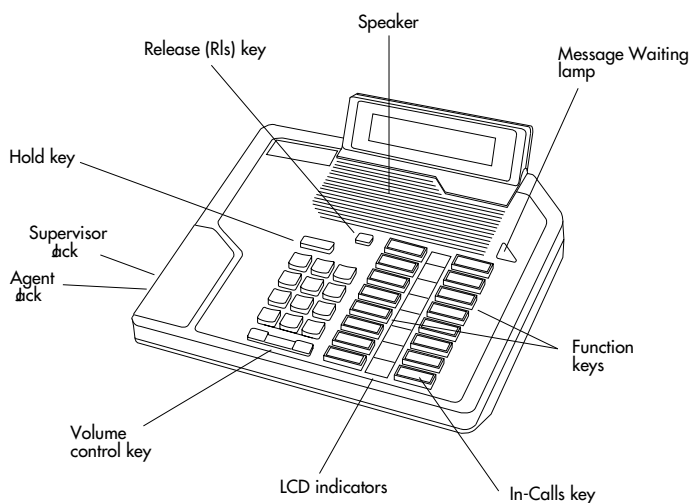## M2216ACD-2*
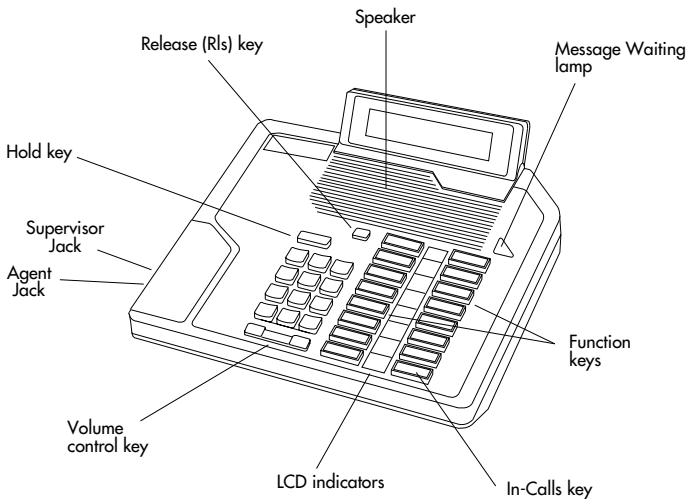
Standard equipment:

- Display module
- Dialpad
- 16 Function keys
- 16 LCD indicators
- Hold key
- Release key
- Speaker
- Volume control
- Message Waiting lamp
- 1 electret headset jack
- 1 carbon headset jack (PJ-327)

Optional hardware:

- Meridian Communications Adapter
- Key Expansion Module
- External Alerter Interface
- Analog Terminal Adapter

*Manufacture Retired in 1995

Learning to use your phone

This chapter explains the parts labeled on the Meridian ModularTelephones pictured on the previous two pages.

In-Calls Key

‎ In-Calls ‎ is assigned to the lower right-hand key on your phone. It is your main ACD extension, also called the ACD DN or queue. The LCD indicator beside it flashes when an ACD call is presented to your phone.

Press ‎ In-Calls ‎ to answer the incoming ACD call (disconnects a call in progress).

Your phone may have secondary extensions (Directory Numbers or DNs) assigned to other function keys. Use the secondary extension to make and receive non-ACD calls.

Release

Disconnect a call on any active extension by pressing ‎ Rls ‎ .

Hold

Place an active call on Hold by pressing ‎ Hold ‎ . Return to the caller by pressing the extension key next to the fast flashing indicator.

Display Key

By pressing ‎ Display ‎ followed by ‎ In-Calls ‎ you may view information on your ACD queue. In an MQA environment, the display will scroll through the different queues at 2 second intervals. The queues will be presented in the order in which they were entered at log in.

Volume control

Adjust the volume on your set using the volume control key. Raise the volume by pressing the right side, lower the volume by pressing the left side. You can adjust the volume of ringing, headset or buzz while you can hear the sound (or by using ‎ Program ‎ and the Display Module — see the *Meridian Digital Telephones and Options Quick Reference Guide*.)

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Display

The Meridian M2216ACD telephone is equipped with a 2 x 24 character display module. The Display assists agents by displaying incoming call information. It assists supervisors by displaying agent and queue information.The idle display, as shown below, gives the current date and time.

```
        24 APR 7:45 P
```

When you go off hook, the time and date disappear and information about your call is displayed.

Program key

The Program key [Program] works in conjunction with the Display. Pressing [Program] enters you into programming mode, where you can make adjustments to your telephone's volume and Display contrast, as well as other settings.

Function keys

In addition to secondary extension number(s), you can have features assigned to the function keys on your telephone. You can have any combination of extensions and features assigned to function keys. An LCD indicator shows the status of the feature assigned to each key.

See "Agent features" on page 12, or "ACD Supervisor features" on pag e21 for information on feature operation.

Message Waiting lamp

The Message Waiting lamp lights when you have a message waiting. Refer to the chapter titled "Message Services" on page 27 for a detailed explanation.

Headsets

The M2216ACD-1 has two jacks for electret headsets. You can adjust the headset interface, using $\boxed{\text{Program}}$, to match the type of headset you are using (See "Program key" on page 5). Contact your sales representative for more information on headset types.

The M2216ACD-2, which was manufacture retired in 1995, has a two-hole jack (PJ-327) for a carbon headset and a jack for an electret supervisor headset.

You can change the supervisor headset to listen-only or talk-and-listen using $\boxed{\text{Program}}$. See "Headset talk/listen" on page 23

The M2216 headset interface has three settings. Until now, those settings have been defined as Plantronics, Liberation (GN Netcom) and handset.

Headsets vary in electrical, physical and audio characteristics. Performance perception is subjective so it is recommended that the headset user try using their headset with each of the three settings on both internal and external calls to determine which works best for them. As with all Meridian Digital Telephones, amplified headsets are recommended.

Agent log in and log out

Log in with Agent ID
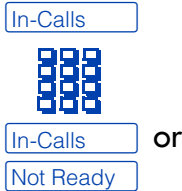
	1. Plug in the headset.
In-Calls	2. Press **In-Calls**.
▦	3. **Dial** your ID.
In-Calls or Not Ready	4. Upon successful log in, press **In-Calls** or **Not Ready** when ready to start work.

Log in without Agent ID

	1. Plug in the headset.
In-Calls	2. Press **In-Calls**.
In-Calls or Not Ready	3. If you are ready to take ACD calls, press **In-Calls** or **Not Ready** again.

Log out

Make Busy	Press **Make Busy** and unplug the headset. The LCD indicator lights steadily and your position is removed from the queue.
	Note: Check with your Call Center Supervisor to determine the remaining steps required to complete the Log out procedure

Log in and log out with MQA

Log in Using Agent ID with MQA (Multiple Queue Assignment)

You enter your four digit **Agent ID** followed by a **Supervisor ID** (if your queue requires one) followed by one or more **ACD DN**s and priority values (if priority values are being used) terminated by # # .

If queues are retained from a prior login by an Agent ID, each queue is displayed for two seconds. Press **In-Calls**, **Not Read** , or **Make Busy** to cancel display of Multiple Queues. Thus, if you usually use the same telephone, you need not repeat the entire log in process at the beginning of each shift. You log in simply by entering **Agent ID** # # # (if your queue requires a Supervisor ID) or **Agent ID** # # (if Supervisor ID is not required).

To choose default **Priority** or **Supervisor ID**, enter # instead of a **Priority** entry or a **Supervisor ID** entry. The **Priority** or **Supervisor** configured for your set will be used.

Note: A Supervisor who is logging in to accept ACD calls will not be able to specify a **Supervisor ID** (even in the case where agents are required to enter one).

Log in using Agent ID with MQA

1. Plug in the headset.

| In-Calls |

2. Press **In-Calls**.

Select one of the following scenarios:

To log in without Supervisor ID or Priority:

3. **Dial** your *Agent ID* # *ACD DN 1* # *ACD DN 2* # *ACD DN 3* # *ACD DN 4* # *ACD DN 5* # # .

To log in with Supervisor ID and without Priority:

3. **Dial** your *Agent ID* # *Supervisor ID* # *ACD DN 1* # *ACD DN 2* # *ACD DN 3* # *ACD DN 4* # *ACD DN 5* # # .

To log in without Supervisor ID and with Priority:

3. **Dial** your *Agent ID* `#` *ACD DN 1* `#`
   Priority 1 `#` *ACD DN 2* `#`
   Priority 2 `#` *ACD DN 3* `#`
   Priority 3 `#` *ACD DN 4* `#`
   Priority 4 `#` *ACD DN 5* `#`
   Priority 5 `#` `#` .

To log in with Supervisor ID and with Priority:

3. **Dial** your *Agent ID* `#`
   Supervisor ID `#` *ACD DN 1* `#`
   Priority 1 `#` *ACD DN 2* `#`
   Priority 2 `#` *ACD DN 3* `#`
   Priority 3 `#` *ACD DN 4* `#`
   Priority 4 `#` *ACD DN 5* `#`
   Priority 5 `#` `#` .

| In-Calls | **or**
| Not Ready |

4. Upon successful log in, press **In-Calls** or **Not Ready** when ready to start work.

Correcting mistakes during the log in procedure

You can correct mistakes made during the log in process by entering `0` `#` and re-entering the previous field. Multiple fields may be re-entered. (See the examples below)

Example 1

To re-enter an ACD DN when Priority is not used (*ACD DN 1* is corrected):

Dial your *Agent ID* `#` *Supervisor ID* `#`
ACD DN 1 `#` `0` `#` *ACD DN 1* `#`
ACD DN 2 `#` *ACD DN 3* `#`
ACD DN 4 `#` *ACD DN 5* `#` `#` .

Example 2

To re-enter a Supervisor ID when Priority is not used (*Supervisor ID 1* is replaced with *Supervisor ID 2*):

Dial your *Agent ID* `#` *Supervisor ID 1* `#` `0` `#` *Supervisor ID 2* `#` *ACD DN 1* `#` *ACD DN 2* `#` *ACD DN 3* `#` *ACD DN 4* `#` *ACD DN 5* `#` `#` .

Example 3

To re-enter a Priority when Priority is used (*Priority 3* is corrected):

Dial your *Agent ID* `#` *ACD DN 1* `#` *Priority 1* `#` *ACD DN 2* `#` *Priority 2* `#` *ACD DN 3* `#` *Priority 3* `#` `0` `#` *Priority 3* `#` *ACD DN 4* `#` *Priority 4* `#` *ACD DN 5* `#` *Priority 5* `#` `#` .

Log out using Agent ID with MQA

| Make Busy |

Press **Make Busy** and unplug the headset. The LCD indicator lights steadily.
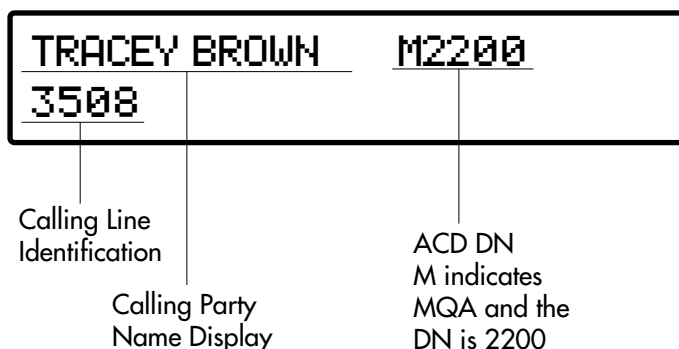
| Make Busy |

If you press **Make Busy** again the LCD indicator will go out. At this point the station can accept non-ACD calls, but you are logged out of the queue.

You can press **Make Busy** while on an ACD call. You will be logged out automatically when the call is finished.

Example set displays for MQA

The following illustrations show examples of an ACD call being presented to an ACD agent who is operating with MQA.

In the first illustration, a direct call is made by Tracey Brown at DN 3508 to ACD DN 2200 and is presented to the MQA agent.

```
TRACEY BROWN    M2200
3508
```

Calling Line
Identification

Calling Party
Name Display

ACD DN
M indicates
MQA and the
DN is 2200

The next illustration also shows an example set display where a direct call is made by Tracey Brown at DN 3508 to ACD DN 2200, and is presented to an MQA agent. However, in this example ACD DN 2200 has a name defined ("SALES"). When the queue has a name defined, the name appears on the agent's display instead of the ACD DN digits.

```
TRACEY BROWN    SALES
3508
```

Calling Line
Identification

Calling Party
Name Display

ACD DN has
been defined
with the name
SALES
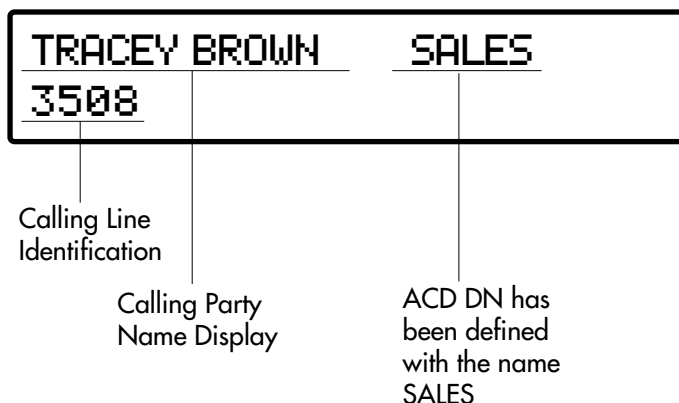
Agent features

This chapter explains the features that are available to agent positions.

Activity code

You answer an ACD call and the Activity Code LCD indicator is flashing:

| Activity |

1. Press **Activity**. The LCD indicator lights steady.

2. Dial the number which corresponds to the present caller's activity.

| Activity |

3. Press **Activity**.

ACD calls

Your phone rings and the In-Calls indicator flashes:

| In-Calls |

Press **In-Calls**. The caller is connected and the indicator lights steadily.

End an ACD call any of the following ways:

| Rls | or

- Press **Release**.

   or

| In-Calls | or

- Press **In-Calls**.

   or

- Wait for the caller to hang up.

   or

| 2637 | or

- Press a **secondary (non-ACD) extension key**. This will remove you from the queue.

   or

| Not Ready |

- Press **Not Read** . This will remove you from the queue.

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Call Forcing (Auto Answer)

The Call Forcing option automatically connects incoming ACD calls. You do not have to press In-Calls.

◄

You hear a short tone. The **In-Calls** indicator lights steadily and the caller is connected.

Note: Pressing **In-Calls** will disconnect an active ACD call if you are using this feature.

Call Forward

If your telephone is equipped with a key for non-ACD calls, you may forward calls directed to this DN.

| Forward |

1. Press **Forward**.

2. **Dial** the DN that you want to forward your calls to.

| Forward |

3. Press **Forward** again.

Calls Waiting indicator

The Calls Waiting indicator shows you how busy the ACD queue is.

The following table lists the four states of the Calls Waiting indicator, and their meanings.

Note: If you have the Display Queue Status feature on your phone, the LCD indicator next to Disp Queue replaces the Calls Waiting indicator

Indicator	Queue Status	Meaning
Off	Light	There are few or no calls waiting.
On	Normal	An acceptable number of calls are waiting.
Slow Flashing	Busy	Calls are backing up in the queue. Calls overflowing to this queue will not be accepted
Fast Flashing	Overloaded	Too many calls are in the queue. New calls are being overflowed to another queue.

Display Queue Status

The Display Queue feature shows you information about the queue.

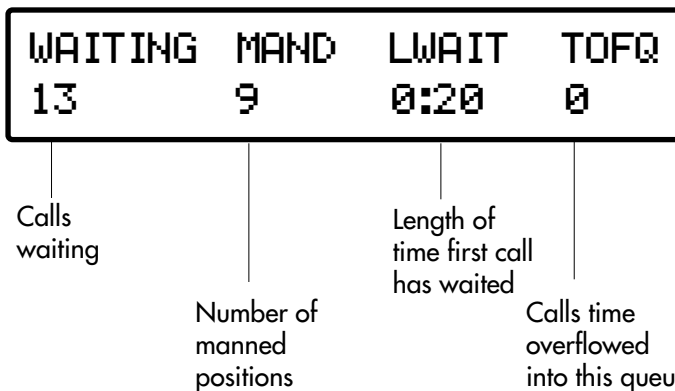| Disp Queue | Press **Display Queue**. A summary of the queue status appears in the window of the display module. If you are using MQA, the displays scrolls through the queues at 2 second intervals in the order of log in sequence. |

To clear the display:

| Rls | Press **Release**. |

Pressing a feature key clears the queue information and replaces it with information associated with the feature.

If you have the Display Queue Status feature on your phone, the LCD indicator next to Disp Queue replaces the Calls Waiting indicator.

```
WAITING  MAND   LWAIT   TOFQ
13       9      0:20    0
```

Calls
waiting

Number of
manned
positions

Length of
time first call
has waited

Calls time
overflowed
into this queue

Emergency

When you have an urgent or abusive call:

| Emergency | Press **Emergency**. The indicator flashes while your supervisor is called. When your supervisor is connected, the LCD indicator lights steadily and you have a three-way conference. |

Note: The Display shows information about the call. Write down this information before you press **Emergency** for future reference.

Headset interface

To change the headset interface to accept the correct headset type

| Program | 1. Press **Program**. |

2. To select the correct headset type, **Dial**:

- 1 (Plantronics, ACS, etc.)
- 2 (Liberation, VXI, etc.)
- 3 for handset.

Note: For other manufacturers, try 1 and 2 to determine which works best for your headset.

| Program | Press **Program** to save the changes and exit. |

Note: Please be sure to consult your headset manufacturer's guidelines for further information.

Hold

To place a call on Hold:

| Hold | Press **Hold**. |

To return to the call:

◄   Press the key beside the fast flashing LCD indicator.

Make Busy

To make your position unavailable to take calls:

| Make Busy | Press **Make Busy**. |

To make your phone available for calls again (after making it busy):

| Make Busy | Press **Make Busy** again. |

Non-ACD calls

To make a non-ACD call:

| 2637 |

1. Press a **secondary extension ke** .

2. **Dial** the number you wish to call.

To answer a non-ACD call, when the telephone rings:

| 2637 |

Press the **extension key** next to the fast flashing indicator. You are connected to your non-ACD caller.

Not Ready

When you need time to catch up on post-call paper work:

| Not Ready |

Press **Not Read** . This takes you out of the queue.

When you're ready to take ACD calls again:

| Not Ready |
| In-Calls |

or

Press **Not Ready** or **In-Calls**.

Note: If you press **In-Calls** during an ACD call, the call will be disconnected.

Supervisor

**To answer your supervisor when
your phone rings and the Supervisor
indicator flashes:**

| Supervisor | Press **Supervisor**.

**If you're on a call and hear a buzz
and the Supervisor indicator flashes:**

| Hold | 1.   Press **Hold**.

| Supervisor | 2.   Press **Supervisor**.

To call your supervisor:

| Supervisor | Press **Supervisor**. This automatically puts a
                                 call in progress on Hold.

To return to the ACD call:

| In-Calls | Press **In-Calls**.

**To Conference a call with your
Supervisor, during a call in progress:**

| Supervisor | 1.   Press **Supervisor**. The caller is on hold
                                      and you can talk privately with your
                                      Supervisor.

| Supervisor | 2.   Press **Supervisor** again after your
                                      supervisor answers. You now have a
                                      three-way conversation with the
                                      supervisor and the caller.

**To Transfer to a Supervisor, during a
call in progress:**

| Supervisor | 1.   Press **Supervisor**.

| Supervisor | 2.   Press **Supervisor** again when the
                                      supervisor answers.

| Rls | 3.   Press **Release** to disconnect. The caller
                                      remains connected with your
                                      supervisor.

Walkaway and Return

Use this feature when you need to leave your desk during an ACD call, a non-ACD call, or while in the Not Ready state.

**To Walkaway during an active ACD
or non-ACD call:**

| Hold |

Press **Hold**. The LCD indicator beside the In-Calls extension flashes.

**To Walkaway while in Not Ready
mode (Not Ready LCD indicator is on,
and NO TREADY is shown on the
display):**

| Hold |

1. Press **Hold**.

2. Unplug the headset or receiver.

To return from Walkaway:

1. Plug in the headset or the receiver, or pick up the built-in receiver, whichever you use normally.

| Not Ready | **or**
| In-Calls | **or**
| 2637 |

2. Press the key next to the flashing indicator.

Note: If a caller disconnects before you return from Walkaway, the Not Ready indicator flashes. When you return from Walkaway, you are in Not Ready mode.

ACD Supervisor features

You can assign any feature listed in the Agent features chapter to the supervisor's telephone (except Supervisor), as well as the features described in this chapter.

Agent keys

Agent keys allow you to call agents by pressing ⎣Call Agent⎦ , then ⎣Agent⎦ and monitor the status of each position, by watching the LCD indicators. Each Agent key is linked to a particular agent position.

The following table shows what the Agent key indicators mean.

Indicator	Agent Status
Off	No agent logged in at this position.
On	Busy on an ACD call.
Slow Flashing	Waiting for an ACD call.
Fast Flashing	Busy on a non-ACD call.

Answer Agent

When your phone rings and the Answer Agent indicator flashes:

⎣Ans Agent⎦ — Press **Answer Agent**. Your position goes into NOT READY state and you are connected to the agent.

To disconnect an agent call:

⎣Rls⎦ — Press **Release**.

Answer Emergency

**When your phone buzzes and the
Answer Emergency indicator flashes:**

| Hold | 1. Press **Hold** if you intend to return to the call in progress. |

| Ans Emerg | 2. Press **Answer Emergency**. Your position goes into NOT READY state and the Answer Emergency indicator lights steadily. You are connected to the call. |

If you wish to just listen at first, unplug your headset before pressing **Answer Emergency**. You will hear the conversation through the telephone's speaker.

To disconnect from the emergency call:

| Rls | Press **Release**. |

Call Agent

| Call Agent | 1. Press **Call Agent**. Your position goes into NOT READY state. |

| Agent | **or** | 2. Press the **Agent Key** assigned to the agent or dial the agent's position ID. |

Note: To talk to another agent repeat steps one and two.

To leave Call Agent state:

| Rls | Press **Release**. |

Display agent status

The Display Agents feature gives you a summary of the current status of all agent positions for which you have agent keys.
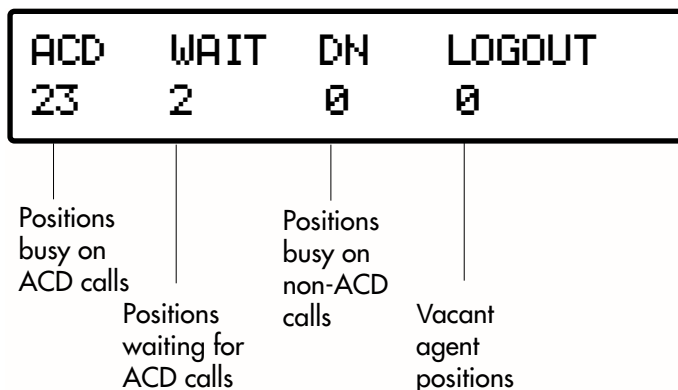
| Disp Agent | 1. Press **Display Agent**. The display shows summary of the current status of all agent positions which have a key assigned on the Supervisor's phone. |

| Rls | Press **Release** to clear the display. |

Agent positions in the NOT READY state will be counted as busy on either ACD calls or non-ACD calls, as specified by your System Administrator.

```
ACD   WAIT  DN    LOGOUT
23    2     0     0
```

Positions busy on ACD calls

Positions waiting for ACD calls

Positions busy on non-ACD calls

Vacant agent positions

Headset talk/listen

| Program and ▦ | 1. Press **Program** and dial 0 8. |

| ≪ ▭ ≫ | 2. Press either side of the volume control key to toggle between listen-only/talk-and-listen. |

| Program | 3. Press **Program** to save the change and exit. |

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Hold non-ACD call

To put a non-ACD call (agent or secondary DN) on Hold:

> Hold

Press **Hold**. The LCD indicator ▶ flashes beside the line on hold.

◀

The LCD indicator flashes slowly.

The caller may hear music if this is programmed on your system.

To take a non-ACD call off hold:

> 2637

Press the **DN** Key beside the flashing LCD indicator ▶.

Interflow

When the call backlog or the waiting time in the queue exceeds a set threshold, Interflow forwards calls to a predefined target queue.

Interflow is activated by the supervisor after the overflow thresholds are exceeded.

To activate Interflow:

> Interflow

Press **Interflow**. The indicator flashes and excess calls are routed to the destination.

To stop Interflow:

> Interflow

Press **Interflow** again.

Night Service

To enter Night Service:
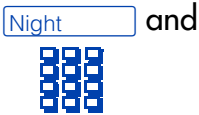
Night and 888	Press **Night** and dial 6 (N for Night). The indicator lights steadily. All call in the queue and new calls receive Night Service.

Transition to Night Service:

Night and 888	Press **Night** and dial 8 (T for Transition). The indicator flashes. Calls in the queue remain in the queue and new calls receive Night Service.

Exit Night Service:
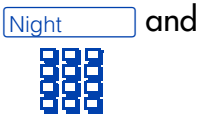
Night and 888	Press **Night** and dial 3 (D for Day). The indicator flashes. New calls enter the queue.

Observe

Observe	1. Press **Observe**. Your position goes into NOT READY state.
Agent or 888	2. Press **Agent** or dial the agent's position ID. You can listen only to the agent and caller's conversation. Repeat step 2 to observe another agent.
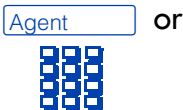
To talk to an agent you are observing:

Call Agent	Press **Call Agent**. You now have a conference with the agent and the caller.

To leave the Observe state:

| Rls | Press **Release**. |

Note: You cannot observe an agent if the agent's call is on Hold or if no calls are in progress.

Recordings and music

| 2637 | 1. Press a secondary extension key. |

2. **Dial** the access code for the recorded announcement or music. You hear the announcement or music.

To disconnect:

| Rls | Press **Release**. |

Message Services

When your phone is busy or unanswered, your calls can be routed to a message center attendant or to the Meridian Mail voice messaging system

Meridian Mail

Meridian Mail is an automated messaging system that allows you to record and play back messages left by people calling to your telephone. By using Meridian Mail you can:

• be sure that all calls are answered pleasantly with your pre-recorded greeting,

• play back messages from your phone,

• send broadcast messages to a group of people.

For complete details on Meridian Mail, see *Meridian Mail Voice Messaging User Guide* .

To Access Meridian Mail:

1. **Lift the handset** or press a **DN** Key.

2. Press **Message** (the stored number is dialed automatically), or **Dial** the Meridian Mail extension number.

3. When you hear "Meridian Mail. Mailbox?", **Dial** your mailbox number (usually the same as your main extension), followed by [#] .

4. When you hear "Password?" dial your password number, followed by [#] .

Basic Meridian Mail commands are listed on the next page.

To End a Meridian Mail Session:

or Dial [8] [3] or **Replace the Handset**. It's best to **Dial** [8] [3] if you called in from an outside number.

Meridian Mail commands

To Rewind 3 Seconds:

Dial 1 .

To Play Message:

Dial 2 .

To Fast Forward 3 Seconds:

Dial 3 .

To Go to Previous Message:

Dial 4 .

To Record:

Dial 5 .

To Go to the Next Message:

Dial 6 .

To Compose a Message:

Dial 7 5 .

To Delete a Message:

Dial 7 6 .

To Send a Message:

Dial 7 9 .

To Change Greetings:

Dial 8 2 .

To End a Mail Session:

Dial 8 3 .

To Change Password:

Dial 8 4 .

Hardware Options

Meridian Communications Adapter (MCA)

You can establish data calls with the Meridian Communications Adapter by connecting your digital telephone to a computer terminal or PC. In this way you can communicate with another computer using your telephone.

This option requires the addition of the Power Supply Board on the M2216ACD-1.

Key Expansion Module

This option provides 22 additional function keys on your phone. You can add up to two Key Expansion Modules for a total of 60 function keys (16 + 22 + 22). Extra keys are often used as Auto Dial keys or Agent keys, but any of the Meridian 1 features can be assigned to them.

This option requires the addition of the Power Supply Board on the M2216ACD-1.

External Alerter Interface

This module provides an interface to standard remote alerting devices, such as a ringing unit installed in a location which is remote from the telephone.

The External Alerter Interface is not the remote ringer itself, but provides access to standard, off-the-shelf remote ringing devices.

This option requires the addition of the Power Supply Board on the M2216ACD-1.

Analog Terminal Adapter (ATA)

The ATA allows you to connect an analog device such as a modem or fax machine to your telephone. The ATA allows you to use these devices while you are on a telephone call.

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